



## DEVELOPMENT COMMITTEE

### UNA FOUNDATION

*Tuesday, August 9, 2022; 4:00 p.m. CST*

Zoom Link: <https://una.zoom.us/j/97836347280>

### AGENDA

- I. Welcome .....Stephanie Teichmiller '84, Chair
- II. Review of Prior Meeting Minutes.....Stephanie Teichmiller
- III. Office of Advancement Update..... Barbie Terry
  - Development Highlights
  - Legacy Initiative
  - College Presidential Donors
  - Why We Exist Document

### MEMBERS

<i>Stephanie Teichmiller '84, Chair</i>	<i>Jacob Ladner '10</i>
<i>Melissa Long '79, Vice Chair</i>	<i>Derrick Mills '00</i>
<i>Christie Bevis '97</i>	<i>Sharon Harris '83</i>
<i>Lorri Glover '90</i>	<i>Robert Steele '78</i>

*Barbie Terry, Staff Liaison*

---

#### ARTICLE V, Section 5

The Development Committee shall assist the President of the University and Advancement staff as directed by the Chair in identifying and cultivating potential major donors.



University of  
NORTH ALABAMA  
FOUNDATION

**MINUTES  
DEVELOPMENT COMMITTEE  
UNA FOUNDATION**

*Friday, March 4 2022; 1:00 p.m. – 2:00 p.m.*

*Zoom*

Present: Stephanie Teichmiller; Chair, Jacob Ladner, Melissa Long; Vice Chair, Derrick Mills, Sharon Harris, and Lorri Glover

Absent: Christie Bevis and Robert Steele

Others Present: Kevin Haslam and Erin Letson

Staff Liaison: Barbie Terry

The meeting was called to order at 1:00 p.m. by Stephanie Teichmiller, Chair along with a welcome to the group. The minutes were passed as presented by the Chair. Chair Teichmiller then turned the meeting over to Ms. Barbie Terry for an Office of Advancement update.

Ms. Terry shared the Advancement update which included highlighting the largest gift to date to the University along with the largest gift to date to the College of Business and Technology. There was also an emphasis on the recent namings of endowed funds that will support unrestricted monies in perpetuity. These funds are transformational in that will eventually replace a line item on the University budget for the area supported. Next, Ms. Terry discussed the 1830 Giving Day Initiative and went through the training document with the group. The group was asked to specifically support the initiative along with sharing with and educating others on ways to give. Ms. Terry explained that this is the call-to-action opportunity for the Committee. We continue to focus on the number of unique donors knowing that if we continue to increase this number, dollars will follow. Finally, Ms. Terry updated the Committee on upcoming events which include the spring meeting of Women of Influence and the Weekend of Women which is in conjunction with the Year of the UNA Woman.

Chair Teichmiller called for any questions or additional comments and the meeting adjourned at 2:00 p.m.



## Development

- On March 1, UNA Advancement launched the month-long 1830 Giving Day Initiative, giving everyone the opportunity to support the University with a gift of at least \$10.00 to the area that means the most to them. We concluded the initiative with 1,027 donors representing 36 states and 4 countries including the US, Canada, Japan and the United Kingdom.
- On March 4, the naming of the Joel R. Anderson Generator and The Joel R. Anderson Entrepreneurship Lab were approved by the BOT.
- On July 1, Athletics launched the \$50 for 50 Initiative. The initiative recognizes the 50<sup>th</sup> anniversary of Title IX and supports North Athletics' female student-athletes.
- Completed 4/5 Annual Giving Initiatives
  - Leo and Una Giving Day Initiative (Lions)
    - \$29,426.41 Raised
    - 179 Donors
    - 16 States Represented
  - Founders' Giving Day (1830 Fund)
    - \$39,374.54 Raised
    - 179 Donors
    - 18 States Represented
  - 1830 Giving Day Initiative (Comprehensive)
    - \$1,605,142.64 Raised
    - 1,027 Donors
    - 36 States Represented
    - 4 Countries Represented
  - Athletic Giving Day Initiative (Athletics)
    - \$50,316.67 Raised
    - 178 Donors
    - 18 States Represented

\*All Giving Day Initiative totals represent record highs

- **FY22 Goals and Progress as of 07/21/2022 (80% of the year elapsed):**

	<b>Goal</b>	<b>Actual</b>	<b>% of Goal</b>
○ Total Dollars	\$6,000,000	\$18,473,442.59	308%
○ Annual Giving	\$800,000.00	\$904,948.20	113%
○ 1830 Fund	\$120,000.00	\$106,923.49	89%
○ Unique Donors	2,272	2,091	92%

\* Note: the previous largest fundraising year in UNA history was FY '18 with \$12,673,900 in new gifts and commitments.



## UNIVERSITY ADVANCEMENT

---

University of NORTH ALABAMA

### ***Why do we exist?***

- To advance the University of North Alabama by fostering generosity.

### ***How will we succeed?***

- Offer clear, concise, and easy ways to give
- Provide excellent stewardship of generosity
- Genuinely value and appreciate each individual

### ***What do we do?***

- *Development* – intentionally engage individuals and develop a relationship with them at the level they are most comfortable and connect them to the University in the manner that is most meaningful to them.
- *Finance* – correctly account for funds in a timely manner that is transparent and easily understandable to the Foundation's constituents.
- *Database Services* – Provide accurate management of constituent information and honor the intents and wishes of all individuals.
- *Corporate and Foundation Relations* – strategic solicitation of corporations and foundations to expand the impact on the University.
- *Office of Alumni Relations* – committed to reaching out to all alumni, establishing a relationship with them at whatever level they are most comfortable and connecting them to their alma mater in whatever capacity is most meaningful to them.
- *OMPR* – to be intentional with the creation and sharing of the University of North Alabama narrative, communicating clearly, concisely, and meaningfully the message to all constituents.
- *Donor Relations* – honor every donor and show them the impact of their generosity.

### ***What is most important right now?***

- People and relationships – measured by the total number of unique donors (2272)
- Data – measured by consecutive days of excellence
- Increased efficiency – automate as many systems as possible by the end of the fiscal year
- Formalize the volunteer program – by the end of the fiscal year

### ***How do we behave?***

- ***Non-negotiable (Permission to play)***
  - Integrity
  - Respect
  - Inclusion
- ***Core***
  - Empathy
- ***Aspirational***
  - Ownership – doing your best and being responsible
  - Open dialogue – communicating with each other in an open, honest, and transparent manner